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## **SFA Organizational Transformation Status Notes**

### **For the Month of February 1999**

The Transformation Team accomplished the following tasks and deliverables in January, 2000:

#### **Students Channel:**

- Provided ongoing support to the Students leadership team to obtain approval for the Students Reorganization Package.
- Support the reorganization approval of the Aid Awareness Organization.
- Drafted and discussed the Direct Loan Servicing IPT Communications Strategy and Communications Plan with Students management.
- Met with Mod Partner resources to discuss the organization impacts of the Direct Loan Servicing Reengineering Options.
- Completed DLSR section of Intro to IPT article for Mod Partner to Mod Partner newsletter.

#### **Schools Channel:**

- Provided ongoing support to the roll-out and execution of Schools project plan developed by Kay Jacks.
- Provided program management capability and support to coordinate change projects for Schools.
- Provided ongoing support to Schools management to design an approach for finalizing the existing organization, beginning a long-term organization design project, and kicking off the Initiatives Program Model within the Schools Channel.
- Facilitates the approval of the initial Schools reorganization package that transferred Accreditation and State Liaison to OPE.
- Drafted and discussed the Common Origination and Disbursement IPT Communications Strategy and Communications Plan with Schools management.

#### **Financial Partners Channel:**

- Provided support to Barry Morrow to plan and conduct the Financial Partner's kick-off held in Chicago. Support included developing support materials and securing Eileen Bedell, Financial Partners SME, to provide expertise and insight.
- Continued participation in the FP Internal Communicators sessions.
- Facilitate the roll-out and execution of Schools project plan developed by Barry Morrow.
- Provide program management capability and support to coordinate change projects for Financial Partners.
- Obtained sign-off from Barry Morrow regarding the next steps for Mod Partner support within Financial Partners, including deliverables, resources, and cost estimates for the work effort.



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#### CIO:

- Continued support to Steve Hawald and Tom Pestka to determine support needs going forward, including deliverables, resources, timelines and cost estimates.
- Prepared skills assessment / inventory approach and tools for CIO.
- Finalizing PDs for remaining CIO positions.
- Provided support implementation of new CIO Organization, including performance support & training to CIO staff.
- Created an organization chart for CIO that included CIO personnel, contractors, functional descriptions, and initiative descriptions.

#### CFO:

- Determined with Jim Lynch and other CFO management that a Reorganization Package is not required at this time.
- Facilitated discussions with Paul Stonner, the CFO learning coordinator, and the designated SFA University learning consultant to identify and define training needs and priorities.
- Developed a financial performance management framework and conceptual design for CFO.
- Conducted PBO Foundations Train the Trainer session.
- Prepared and facilitated the first CFO Visioning Session and prepared for the second session to be held in early March.

#### Contracting & Acquisitions:

- Created resource guide that includes: COTR roles, training offerings, and other resources
- Developed an overall acquisition process flow for a presentation to the Senior Leadership
- Prepared the transmittal memo for the OM Package.
- Provided support to C&A management to obtain approval for the C&A Reorganization Package.
- Develop the SFA Acquisitions procedural manual.
- Conducted best practices review with SFA leadership team and orientation with COTRs.

#### Human Resources:

- Presented best-practice organization design and PDs for new HR organization.
- Assisted Greg Woods and Candy Kane in presenting findings to Departmental leadership.
- Developed a perspective of the Employee Lifecycle at SFA incorporating best practices and existing services provided by SFA HR and HRG (e.g., GPAS, IDP).
- Met with PACT Team to discuss Dept approach to competency development.
- Created draft HR organization design and implementation plan.



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#### Analysis:

- Completed visioning sessions with Analysis management team.
- Prepared the OM Reorganization Approval Package and supported Bob with discussions with Greg Woods and Candy Kane, other Directors, and General Managers.
- Assisted Analysis staff in performing market analysis research.
- Conducted further activity analysis of the PDD area within Analysis and presented findings to Bob Knisley.
- Completed decision tree (process flow) document outlining the student loan default process.
- Supported Analysis in the development of enterprise wide performance measurement framework and system.
- Support roll-out and implementation of Analysis organization.

#### Communications:

- Finalized and supported the approval of the OM Reorganization Package for Communications.
- Supported the roll-out and implementation of Communications organization.
- Met with Karen Freeman to review the Products and Services and key communication events and required activities.
- Worked with Karen Freeman to plan and schedule PBO Foundations training.
- Met with Karen Freeman and Intranet IPT to discuss strategy, approach, and employee expectations.
- Drafted Modernization Partner Communication "Strategy/Issue" document for use by potential Communications/PR Firm.
- Retained Golin Harris, PR firm, to provide PR and communication services to the Modernization Project and look for opportunities to leverage their services to SFA.

#### SFA University:

- Assisted with several management meetings and an "all hands" event to communicate the new organization structure and associated functions including the proposed assignments for SFA U employees.
- Supported the development of key functional areas within SFA U.
- Provided support to Ann Teresa in communicating her organization to Greg Woods, Candy Kane, SFA General Managers and Directors.
- Assisted in designing training curriculum and strategy for skill-based training for IT, financial management, contract management competencies.
- Assisted in the development of a career and competency model for SFA.
- Assisted in documenting cross-cutting, end-to-end business processes for training SFA employees on new business processes.
- Assisted in the roll out and conduct of PBO 101 and IPT training.
- Advised on Terminology Handbook production for Karen Freeman.